

Beneficiary Update



When you first filled out the documents for your retirement plan, you listed your account beneficiaries—that is, the people who will receive the assets in your plan after you pass away. Be sure to revisit these designations every year in case you need to make a change; in most cases, *beneficiary listings override wills*.

Beyond your spouse

It's also a good idea to name secondary beneficiaries. For example, listing your children as secondary beneficiaries allows your assets to pass to your kids in the unlikely event that something happens to both you and your spouse.

Staying current with your beneficiaries will ensure that your money will go to the right people when then time comes. ■

Have Questions?

Need More Information?

Web site*: www.wellspansavings.com

KeyTalk*: 877-SAV-WELL (728-9355)

Please note: This newsletter does not constitute investment or financial-planning advice. Please consult with your financial planner, attorney and/or tax adviser as needed.

*Access to KeyTalk® and the Web site may be limited or unavailable during periods of peak demand or market volatility, systems upgrades/maintenance or for other reasons.

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CB1098FF_4Q12 (1/01/2013) 159718

WINTER 2012



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WELLSPAN HEALTH FINANCIAL FOOTNOTES

A New Look and Feel

Our logo and brand name has changed, but the business stays the same



We at Great-West Retirement Services[®] are proud to share our new brand and logo, which we have changed to be consistent with our newly launched corporate brand of the Great-West companies. **The Great-West Retirement Services business segment is unchanged**, other than that it will use our new corporate brand logo.

Our new brand name, **Great-West FinancialSM**, and logo are reflected on your statement. Soon our new brand and logo will appear on all communication materials, with the new look we're using in this issue of *Financial Footnotes*.

In addition, our Maxim and Orchard Trust funds names have changed. **All funds now carry the Great-West name and no longer reference the names Maxim or Orchard Trust.*** However, the funds and their underlying investments are not affected.

Committed to retirement planning

Great-West remains the same strong, stable company committed to its employees, customers and markets. We're excited to be able to share the new name and logo with you, and we look forward to continuing to serve your retirement planning needs. ■

*During the fund name transition period, you may still see materials where the Maxim and Orchard Trust names are used.